

Market **OUTLOOK**

Week 19: May 4–May 10, 2026



Market **ALERT**

- Apples
- Asparagus
- Berries
- Broccoli
- Carrots
- Cauliflower
- Celery
- Citrus
- Corn
- Cucumbers
- Grapes
- Lettuce
- Melons
- Peppers
- Pineapples
- Tomatoes

transportation

Nat'l Diesel Avg: \$5.351↓

Last Year: \$3.514↓

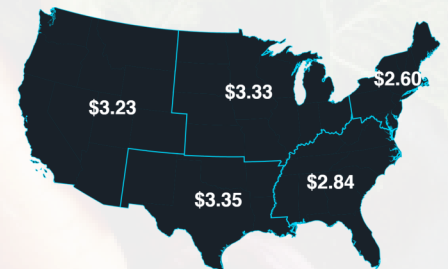
Nat'l Fuel Surcharge: \$0.75

Shortages: Freight market is flat

- extreme - FL
- slight - AZ, CA, & TX

National Posted Rate per mile

previous week's average outbound reefer rate for each region
Map from [DAT](#)



weather **OUTLOOK**

Oxnard, CA: Partly cloudy sunny skies throughout the week with highs in the mid 60s and low 70s and lows in the 50s.

Salinas, CA: Cloudy with highs in the 60s and 70s and lows in the 50s.

Yuma, AZ: Sunny skies with highs in the 80s and upper 90s with lows in the 50s to 70s with cloudy skies on Monday.

Immokalee, FL: Partly cloudy and sunny skies with some PM Thunderstorms on Saturday and Sunday with highs in the 80s and 90s and lows in the 60s and 70s.

Idaho Falls, ID: Partly cloudy and sunny skies with highs in the 70s and lows in the 40s.



Market UPDATE

apples



ALERT Prolonged September heat required heavy irrigation to protect tree health and maintain fruit quality, but it also pushed fruit sizes larger across the industry. Washington’s Gala crop is more than 4 million boxes below last year, and current sizing is peaking on medium to large, leaving 125/138 counts in very limited supply. Markets are expected to firm, and shifting to other red varieties—such as Fuji or Pink Lady—is strongly recommended where possible. Granny Smith sizes are also running large, with 125/138 counts virtually unavailable and no comparable green variety to substitute. The variety is expected to remain at premium market levels, and customers are encouraged to plan for alternative fruits when small-size needs cannot be met.

asparagus



ALERT The market remains tight into early May, with limited supply as Mexico continues to wind down and domestic production has yet to fully fill the gap. Mexican volume from Northwest and Central regions remains light, while Peru provides supplemental supply with controlled availability and some quality variability tied to transit and demand selectivity. Early domestic harvests in Michigan and the Pacific Northwest are increasing but remain insufficient to ease pressure. Demand is elevated ahead of Mother’s Day promotions, keeping markets firm. Quality is generally acceptable, though inconsistencies in spear diameter and shelf life are noted on longer hauls. The market remains disruption-sensitive, with uneven fill rates likely.

avocados



Supply remains steady with consistent harvests out of Mexico. Larger sizes are widely available, while smaller fruit is still limited for some

programs. Demand is steady and well-matched to volume, keeping pricing stable. Overall quality is solid, with good maturity and reliable eating performance.

bananas



Supply remains steady with reliable shipping and well-balanced conditions. Availability continues to meet demand, and pricing is holding stable with no disruptions expected in the near term.

beans



Green Beans: Conditions vary by region. Eastern supplies are steady with good quality and balanced demand, keeping pricing stable to slightly lower. Western supplies remain tight due to transition gaps and acreage shifts, resulting in elevated and volatile markets. Desert production is expected to provide gradual relief. Overall demand remains solid, but availability and sizing can be uneven, especially for foodservice-preferred grades.

berries



Blackberries: Persistent heat in Mexico is increasingly impacting quality. Supply remains steady, but higher temperatures are pressuring fruit size and firmness. About 80–88% of volume is graded Fancy, with Premium percentages declining due to heat stress. Overall quality remains acceptable, with many ranches still packing meaningful premium and fancy volumes. The region is at peak production, expected to continue for the next two months, supporting ample supply despite quality challenges.

Blueberries: **ALERT** Mexico remains hot with acceptable quality, as many ranches continue shipping solid volumes of premium and fancy fruit; minor quality regression is manageable, and peak production should continue for the next two



Market UPDATE

berries cont...



months. Southeast volumes remain below original expectations due to freeze impacts, but conditions are improving: Florida quality is strong, Georgia volumes are building, and total Southeast supply is expected to increase. Oxnard is finishing its season, with the last meaningful harvest wrapping up. In the Central Valley, recent rain caused brief delays, but conditions have improved and the supply outlook remains steady.

Raspberries: Temperatures across Mexico remain hot but have moderated slightly. Production continues to perform well, with strong quality reported, including good color, firmness, and flavor. Most volume is packed into Premium and Fancy and has held up well in the heat. Operations remain on schedule with no major disruptions. Peak volumes are expected to build through May, supporting consistent supply.

Strawberries: With no rain expected for 7–10 days, fields should dry out, improving harvest flow and fruit quality. Conventional quality remains strong with minor bruising managed through sorting, while production stays steady before tapering mid-May. Salinas and Watsonville are recovering from recent rains, though heavier rainfall in some Watsonville fields caused cracking and decay concerns. Cooler conditions will ease into low-70s warmth next week, helping normalize harvests as volumes recover, quality improves, and production trends back to seasonal norms ahead of a May peak.

broccoli



Broccoli: EXTREME Supplies will be extremely limited over the next few weeks. Earlier warm weather accelerated maturity, advancing harvests, while recent cooler conditions are now slowing availability. The next two weeks will be

most challenging as the industry enters a supply gap. Demand remains very strong, driving markets to extreme levels. Overall quality is reported as fair.

Broccolini: ALERT Supplies are light with strong demand. Production has shifted to Salinas, and pricing is climbing alongside firmer broccoli markets. Quality is fair, and overall availability is expected to remain tight with continued upward pressure on the market.

brussels sprouts



Supplies are steady with fair quality reported. Availability should remain stable near term, allowing for promotional opportunities. Pricing is expected to increase with higher demand.

cabbages



Supplies are steady with good yields and quality reported from Central CA. Demand increased this week, though markets and contracts remain stable. Supplies are expected to stay consistent as the transition to Central CA continues.

carrots



ALERT The market is showing steady improvement, with production now centered in Coachella and the Imperial Valley. Warmer temperatures, including recent heat, are helping crops size up and boosting yields, supporting a gradual recovery. Fill rates—especially on baby-peeled items—are improving and should continue to strengthen over the next couple of weeks. Cello and jumbo remain very limited, as sizing is still the main constraint across the industry. An earlier-than-usual transition into Salinas could help bring additional balance to supply, but full normalization will take time as sizing and yields continue to rebound.



Market UPDATE

cauliflower



EXTREME Supplies are very limited and will remain short over the next two weeks. Weather fluctuations accelerated maturity, but cooler temperatures are now reducing yields, creating a supply gap. Quality is reported as fair. Tight supplies and extreme markets are expected to persist during this period.

celery



ALERT Supplies remain light following the transition from Yuma to Oxnard. Demand has increased, keeping pressure on the market. Overall quality is reported as fair. Limited availability and elevated pricing are expected over the next few weeks.

citrus



Limes: RADAR Availability continues to improve, though size coverage remains uneven. Small and medium fruit is becoming more accessible, while larger sizes vary by arrival timing and port. Markets have stabilized with modest price softening, though volatility risk remains. Quality is generally acceptable, with some variability in color and firmness tied to transit. Demand is steady, and coverage has improved, though logistics remain a sensitivity.

Lemons: RADAR California production is transitioning through spring, but size challenges persist. Small and medium sizes remain limited, with availability skewed toward larger fruit due to prior weather stress. Demand remains consistent across channels, keeping pricing firm—especially on 140s and smaller. Quality is generally good, though cosmetic defects are increasing sorting pressure. The market remains structurally tight with limited near-term relief.

Oranges: ALERT Severe size imbalances continue

corn



AOG Supplies are expected to remain limited for at least two more weeks. Mexico continues to face quality issues leading to load rejections, reduced availability from soil stress and rains, and lower overall production. Florida is ramping up with limited volume. Prorates may continue under Act of God clauses, though growing region transitions and improving Eastern quality have brought slight week-over-week market relief.

cucumbers



AOG Supplies have eased slightly, particularly in the West and Mexico, though markets remain limited. Western and Mexican volumes are slowly approaching peak, helping relieve demand pressure. Florida's spring crop has started with light volume, with conditions gradually improving and moderate to full relief expected by the second week of May.

grapes



ALERT Green remains tight ahead of a fuller transition to Mexican supply, while red is firming as Chile wraps up. Quality is good across both colors, but inventories are sensitive. Markets are expected to stay firm until Mexican volumes ramp up later in May, following early heat impacts.



Market UPDATE

herbs



Markets are generally stable but regionally sensitive, particularly for basil and parsley. Southern California and Baja remain primary suppliers, though periodic harvest gaps and weather impacts are affecting consistency. Demand has normalized, helping stabilize pricing, but quality variability persists—especially on delicate items like basil and dill. Some sizing and bunch weight inconsistencies are being reported, requiring closer inspection at receipt. Overall supply is adequate but vulnerable to short-term weather and labor disruptions.

Cilantro: Supplies are steady with fair quality reported, while demand remains strong. Shipping from Oxnard and Salinas has improved availability. Continued supply improvement should support further market relief.

kale



Supplies are steady with good demand. Quality is reported as fair, and availability is expected to remain steady. Shipping from Oxnard and Central California, with stable pricing.

lettuce



Green & Red Leaf: **ALERT** Supplies are light this week, with only fair quality reported. Earlier weather accelerated maturity, while cooler temperatures are now reducing yields, resulting in a supply gap. Markets have escalated pricing.

Iceberg: **EXTREME** Supplies remain extremely limited, though Salinas has started seasonal harvest. Earlier weather accelerated maturity, but cooler temperatures are now reducing yields, creating a supply gap. Demand remains strong, with processors seeking additional acreage. Carton weights are lighter than normal, and

quality issues, including head abnormalities and early signs of INSV, are being reported. Markets will remain elevated over the next few weeks.

Romaine: **EXTREME** Supplies are light due to earlier accelerated maturity and current cooler temperatures reducing yields, along with insect pressure. Quality is reported as fair, with head abnormalities and early signs of INSV noted. Markets remain elevated, and limited supplies are expected to persist for the next few weeks.

Tender Leaf: Supplies are steady, easing market pressure as more volume becomes available. Transition to Central CA and the Watsonville/Salinas region should improve quality.

melons



Cantaloupe: Supplies are in good shape with favorable harvest conditions and strong overall quality. Sizing continues to skew larger, with smaller counts tighter and carrying a premium, but overall availability remains stable.

Honeydew: **ALERT** Supplies are now exceeding demand as the market moves past the most challenging part of the import season. Guatemala and Honduras continue to face downy mildew pressure, impacting yields, sizing, and brix levels. Supply should remain steady until domestic Yuma production begins mid to late May.

Watermelon: The market remains well supplied with steady demand and into May. Prices may continue to ease, but diversified sourcing and healthy year-to-date movement are expected.

mushrooms



Supplies of white and brown mushrooms remain light, while demand is strong. Quality has improved, and the market is approaching peak production. Supply and quality improvements are expected beginning next month.



Market UPDATE

onions



The market is firming as the OR/ID storage season winds down, with prices trending upward due to tightening supplies and improving demand. Texas is wrapping up, and California is starting with lighter volumes, and quality is strong. New Mexico is starting mid-May. This combination is creating upward pressure on the market, especially for high-quality yellows and reds. As the transition continues, the market is expected to remain on a firmer footing, with price increases likely to persist unless new crop arrivals accelerate sharply or weather disruptions ease supply constraints.

onions green



Supplies continue improving as Mexico stabilizes labor and production. Markets should improve gradually over the next few weeks.

pears



Washington's 2025 crop is rebounding after a challenging 2024 season, with growers reporting excellent bloom, minimal frost damage, and strong, uniform sizing. Early estimates suggest the crop could exceed 400K tons, returning to pre-2022 levels, thanks to favorable spring weather and improved orchard management.

peppers bell



AOG Supplies are slowly improving after recent tightness driven by regional transitions and inconsistent Mexican quality. Colored bells remain limited following Mexico's early finish, while green bells face quality challenges. Broader recovery is expected by the second week of May as desert, Coachella, and Canadian greenhouse volumes rise. In the East, Florida is finishing with a smooth transition to Georgia in mid-May,

supporting a steady supply into Georgia and the Tennessee season beginning in late June.

peppers chili



AOG Florida supplies remain very limited following freeze damage, with Poblano and Serrano especially tight until South Florida and Plant City production increases. Sinaloa volumes remain low to moderate due to weather, disease, and pest pressure. Light central Mexico production continues to ease pressure week over week, with overall availability expected to improve over the next 10 days.

pineapples



RADAR The market is showing modest tightening entering May. Ongoing agronomic challenges in Costa Rica—including excess rainfall, limited sunlight, and disease pressure—continue to impact yields, sizing, and exportable volume. Supply remains sufficient heading into May.

potatoes



Idaho russets are now shipping from storage, with this season's crop showing improved quality and a stronger size profile. Larger sizes are more readily available compared to last year. Market pricing is steady, supported by ample supplies, creating favorable promotional conditions.

squash



Florida supplies remain limited following cold damage but are improving week over week as replanted fields come online; current fruit quality is average. In the West, Mexico is providing moderate zucchini volume and improving yellow squash supplies with fair to good quality despite some cosmetic issues. Markets are currently at normal pricing.



Market UPDATE

tomatoes



AOG Supplies remain tight across grape, Roma, and round varieties due to ongoing production and quality challenges in Florida and Mexico. Grape tomatoes are showing early improvement with Florida harvests underway, though disease pressure and reduced Mexican volumes continue to limit supply, with more noticeable recovery

expected by early May. Roma availability remains constrained by reduced Florida harvests and an early wind-down in Mexico, offering only brief pricing relief. Round tomatoes are the most impacted, with light volumes, quality issues, and elevated markets expected to persist through mid-May, potentially extended by Cinco de Mayo demand, requiring continued flexibility in sourcing and offerings.

in the news...

Fresh Produce Knockout: Cinco de Mayo's Retail Punch

Doug Ohlemeier | March 20, 2026 | producebusiness.com

Promoting this Mexican food holiday can lift produce sales.

With Cinco de Mayo now much bigger than a Mexican independence day celebration, promoting the holiday can help retail produce executives increase sales.

Celebrating the May 5 event is a way to honor Latin heritage. Produce departments can cater to their stores' Hispanic and non-Hispanic customers through constructing large displays calling attention to and reminding shoppers of the food holiday.

Though Cinco de Mayo isn't celebrated by everyone, promotions around the holiday are important because the event brings needed added retail produce sales following slower winter months.

"Cinco de Mayo is a great holiday for the produce department," says Marc Goldman, produce director for Morton Williams Supermarkets in Bronx, NY.

"As for avocado sales, it's right up there with the Super Bowl and New Year's. It's a good holiday for guacamole and salsa, and also all the ingredients that go into making both. That usually adds up to a good week in business."

For the avocado industry, the holiday is pay dirt.

"Cinco de Mayo is the second largest avocado holiday/event," says Peter Shore, vice president of product management for Calavo Growers Inc., Santa Paula, CA. "Avocados play the center part in Cinco de Mayo promotions and accompany Mexican-themed celebrations. Calavo will have good supplies of avocados from Mexico and California during this promotional period."

Cinco de Mayo commemoration has expanded into a major celebration of Mexican culture and heritage, particularly through food and drink.

"Cinco de Mayo is one of the most important promotion windows for avocados in the U.S., with it consistently being one of the top avocado-selling occasions of the year, often ranking second or third, alongside the big game and Fourth of July," says Ken Melban, president of the California Avocado Commission (CAC), in Irvine, CA.

"From the CAC's perspective, Cinco is a key early-season catalyst that can help retailers build strong momentum for avocados, just as they are transitioning into California fruit, which is in a highly promotable window April through August," Melban adds. "For retailers, that makes Cinco de Mayo a natural occasion to highlight California avocados, build excitement in the department, and set the pace for continued summer promotions to drive repeat purchases of California..."

[Read full article HERE](#)

If you have any specific questions or concerns on any commodities not mentioned in this report, please feel free to reach out to jhoppe@nproduce.com and we will be happy to give you those current market conditions. Also look for our Spanish version that will be released on Monday. Have a great week!

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